Statistical Bulletin: 03 / 2018
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Údarás Náisiúnta Iompair
National Transport Authority

Commercial Bus Services

in Ireland

Bulletin Topics:

- Number of Operators and Licences
- Passenger Journeys
- Scheduled Vehicle Kilometres
- Revenue and Ticketing
- Free Travel Passenger Journeys
- Fleet Size
- Accessibility
- Automated Vehicle Location (AVL)
- Fleet Age

Introduction

This statistical bulletin is a publication of the National Transport Authority of Ireland (the "NTA"). It focuses on bus statistics for licensed public bus passenger services operating to a regular schedule in Ireland. The NTA was established under the Dublin Transport Authority Act, 2008 as amended, and is required[1] to "collect, compile, analyse and prepare information, data or statistics" regarding public transport services in Ireland

Once a year operators of licensed regular public bus passenger services submit data to the NTA for the previous year's operation of their regular public bus passenger services. Data for licensed public bus passenger services in the Greater Dublin Area (the "GDA")[2] was first collected for the year 2013. Data for the entire State was first collected for the year 2014. Some figures provided in the past by licence holders may have been revised by operators. The data expressed in this bulletin utilises the most up to date information provided by licence holders and updates all previous bulletins.

High level information on State funded services, which are subsidised transport services provided under contract to the NTA, has also been included for comparative purposes. These services are referred to as Public Service Obligation ("PSO") services. The NTA publishes a separate bulletin on State funded services "Bus and Rail Statistics for Ireland – State Funded Services" which can be found on the NTA's website at: www.nationaltransport.ie/publications/statistics/

Definition of the Licensed Regular Public Bus Passenger Services covered in this Statistical Bulletin

Licensed public bus passenger services are often called "commercial" bus services because they are operated without any public subsidy from the NTA. These commercial bus services are individually licensed by the NTA. Some commercial bus services, however, receive payments from the Department of Employment Affairs and Social Protection's Free Travel Scheme in compensation for the revenue foregone from carrying those passengers entitled to free travel.

The commercial bus services covered by this bulletin include any licensed regular bus service with an origin, intermediate point, or a destination within the Republic of Ireland. In short, any service travelling through any part of the State. Bus services which were subject to an international authorisation under EU law, and were travelling to, from or through Northern Ireland and then into this State are also included in the bulletin. These licensed and authorised services covered in this bulletin are collectively referred to as commercial bus services.

References to commercial bus services therefore include licensed services operating wholly within the State and commercial bus services which cross the border into Northern Ireland and are subject to an authorisation.

Acknowledgement

The NTA would like to extend its appreciation to the licensed and authorised commercial bus operators for their co-operation and assistance in contributing to this bulletin. 98% of operators with active licences in 2017 supplied a return. 100% of operators made a return in previous years. The licences where no data was provided are listed on the NTA's website.

Readers should be aware that the two principal contracted State funded bus operators, Bus Éireann and Dublin Bus, also provide commercial bus services. These include the commercial Bus Éireann services such as the Expressway services and the commercial Dublin Bus Airlink services. The figures for these services are included in this bulletin.

Licences Categories not included in the Bulletin

Certain public bus passenger service licence categories are not included in this bulletin because of the more discretionary nature of the services. The licence categories excluded are Event and Venue licences, Specific Targeted licences, as well as Temporary licences and Demand Responsive licences. Complete details of each of category of public bus passenger service licence can be found in the 'Guidelines for the Licensing of Public Bus Passenger Services' available to download from www.nationaltransport.ie/bus-licensing/

References to GDA and Non-GDA services

References to commercial bus services as 'GDA services' refers to any service travelling to, from or through any of the GDA counties of Dublin, Meath, Wicklow or Kildare. This includes commercial bus services that travel wholly or in part within the GDA. GDA services for the purposes of this bulletin include both licensed and authorised services.

The bus services travelling wholly outside of the GDA counties are referred to as 'Non-GDA services' and 'Nationally' refers to the combined figures for all the bus services running to, from or through the State. These are the meanings assigned throughout the document, unless otherwise stated. Again, these services include licensed and authorised services.

Two operators did not supply returns for bus services provided in 2017. The combined figures for these licences accounted for less than 1% of previous years' overall totals. Where possible, figures for these commercial services have been extrapolated based on previous returns. However, due to the rounding used in this bulletin, the figures have no statistical impact.

NTA Obligations in Relation to Commercially Sensitive Information

In publishing data the NTA has been fully aware of its obligations regarding commercially sensitive information and has therefore ensured that patronage and revenues have been presented in a consolidated and anonymised fashion.

Statistical Qualification

It is important to know that the figures used in this bulletin are provided by the operators and are not independently verified by the NTA. Some figures have been estimated by operators. The figures are intended to illustrate general features and broad trends for commercial bus services in Ireland. They are not meant to be read as precise calculations. Rounding has been used which could affect overall percentages. Please also be aware that some figures from previous years' may have been revised by the operators this year. The data expressed in this bulletin utilises the most up to date information provided by the operators and updates all previous bulletins.

[1] Section 73 (Information, data and statistics) of the Dublin Transport Authority Act 2008, as amended by section 75 of the Taxi Regulation Act 2013

[2] The Greater Dublin Area comprises the city of Dublin and the county council areas of South Dublin, Fingal, Dún Laoghaire-Rathdown, Kildare, Wicklow and Meath

Overview of Figures for Commercial Bus Services in 2017

Total Passenger Journeys (Nationally)

2016 25.24 Million Journeys

2017 25.78 Million Journeys

Up 2.1% from 2016

Total Scheduled Vehicle Kilometres (Nationally)

2016 92.08 Million KM

2017 92.34 Million KM

Up 0.3% from 2016

Total Revenue (Nationally)

2016 €176.11 Million Euro

2017 €177.78 Million Euro

Up 1% from 2016

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Overview of Commercial Bus Services

There has been significant and sustained growth in the commercial bus services sector over the five years for which data has been collected. The sector has seen growth in passenger journeys, scheduled vehicle kilometres provided and revenue each year since 2013 and this continued in 2017.

Two events in 2017 had an effect on the number of commercial services provided, the number of persons travelling, and therefore the figures for the year. The first event was the 21 day period, from 24th March 2017 to the 13th April 2017, inclusive, where due to industrial action no Bus Éireann services operated. This included Expressway and all other commercial Bus Éireann services. The second event was Storm Ophelia. Due to the severe weather warning schools and colleges remained closed on Monday 16th October 2017 and many public services and businesses nationwide remained closed or closed early on that day. The effects of the Storm would have had an impact on the provision and utilisation of public transport services in the days following the storm.

While there has been an overall growth on a National level, this was due to growth on GDA services. Commercial bus services operating wholly outside of the GDA, referred to throughout as Non-GDA services, showed a decline in passenger journeys and scheduled vehicle kilometres provided between 2016 and 2017.

The volume of passenger journeys made on commercial bus services has increased each year since 2013. There were 28% more passenger journeys made in 2017 than were made in 2013. The overall passenger journeys figure increased by over 2% between the years 2016 and 2017. In 2017 passenger journeys on commercial bus services represented 9% of all public transport journeys in the State[3].

The scheduled vehicle kilometres provided by the commercial bus sector is always a high ratio of all the public transport vehicle kilometres provided, including light and heavy rail services, as well contracted bus services. This is due to the large variation in the nature of the bus service types provided.

Scheduled vehicle kilometres have also increased each year since 2013 but at a lower rate than increases in passenger journeys, with a 15% increase on the 2013 figure. Scheduled vehicle kilometres nationally increased by less than 1% between the years 2016 and 2017. In 2017 commercial bus services scheduled kilometres represented 45% of all vehicle kilometres travelled by public transport[4].

The type and size of operators providing commercial bus services also varies significantly. In 2017, 15% of the operators accounted for 90% of both the commercial passenger journeys taken and the scheduled vehicle kilometres operated. This was unchanged from 2016. Operators using more than ten vehicles represented 22% of all operators. Operators using one to two vehicles represented 42% of all operators. In 2013 there were more operators using one to two vehicles, at 47% of all operators while 17% were using over ten vehicles. The number of operators in 2013 was the same as in 2017, however there were 18% fewer vehicles being used full time in 2013. This indicates that operators fleet sizes have grown.

Table A: Overview of the Commercial Bus Passenger Sector (in Millions)

Year	All Passenger Journeys	Free Travel Passenger Journeys (Estimated)	Scheduled Kilometres	All Revenue
2013	20.10	4.79	80.10	€135.94
2017	25.78	5.21	92.34	€177.78
Change 2013-2017	28.2%	8.8%	15.3%	30.8%

[3] Excluding Taxi journeys and School Bus services
[4] Excluding Taxi journeys and School Bus services

1

Number of Operators and Licences

It is important to highlight that there is large variability and diversity in the scale, frequency and type of commercial bus services provided by operators.

Commercial bus services include large scale inter-city and interurban bus services which provide connections to and from the country's main towns, cities and airports; commuter services that bring passengers to employment and education; urban and suburban services as well as rural services that generally link small towns, villages and rural areas.

There are large variations in the size and scale of operators providing commercial bus services in terms of the number of licences held and the number of vehicles used to provide these services. An operator holding a single licence may provide numerous services per hour or per day on that licence, using several vehicles with large passenger capacities. On the other hand an operator can also hold several licences, each of which may have a small number of services per week or per month, and provide all of these services using one vehicle with a lower passenger capacity.

Tables 1A and 1B show the number of active operators and licences per year. Where a licence and an authorisation are operated in conjunction with each other this has been counted as one service. Table 1C shows the number of new licences granted for commercial bus services. Regular licences are valid for three years and expire if not renewed. Licences can also be revoked by the NTA or at the request of the operator.

There were a total of 127 operators with regular public bus passenger service licenses in 2017. Five were new entrants[5] to the regular commercial bus services market. Of the 127 operators 124 were actively providing services in 2017 with a total of 335 active regular licences and authorisations. In 2016 there were four new entrants and seven in 2015.

The number of active licences and new licences granted has decreased since 2015. There were 18[6] new regular licences granted in 2017. Of the 18 new licences granted, 13 commenced in 2017. These are accounted for within this bulletin. 10 of the new licences were for Non-GDA services. Most of the new licences granted since 2014 have been for Non-GDA services. These figures are set out in Table 1C and 1D. New licences granted and commenced represent approximately 4% of all licences operated in 2017.

On a National basis half of all operators held only one licence. This has remained static since 2015. However for Non-GDA services this figure is higher, with two out of three operators holding only one licence in 2017.

Table 1A: Number of Operators with Active Regular Licences

Year	Number of Operators with Active Regular Licences
2013	124
2014	127
2015	126
2016	122
2017	124

[5] New entrants can include instances where licences were transferred from sole traders to limited companies, as well as operators entering the regular service market who were not in the market in the previous year or were previously active in the non-regular bus passenger services market, such as the tourist market

[6] New licences do not include where an existing licence lapsed and the services were re-applied for and a new licence issued

Table 1B: Number of Active Regular Licences

Licences/Year	2015	2016	2017
Non-GDA services	214	217	217
GDA services	131	127	118
Total Licences & Authorisations	345	344	335

Table 1C: Number of New Licences

Year	Non-GDA services	GDA services	Total New Regular Licences Granted	New Licences which Commenced in year granted
2014	25	7	32	--
2015	20	15	35	33
2016	12	11	23	17
2017	12	6	18	13

Table 1D: Percentage Split of New Licences Granted between GDA and Non-GDA services

Year	Non-GDA services	GDA services
2014	78%	22%
2015	57%	43%
2016	52%	48%
2017	67%	33%

Tables 1E to 1G set out the percentages of operators by the number of licences held and compare national totals against the GDA and Non-GDA only operators. Figures 1.1 and 1.2 show the percentage of licences held and the share of the passenger journey market.

Half of all operators in 2017 held one licence and accounted for 6% of all the passenger journeys nationally. This was the same as 2016. The situation differs for operators solely providing Non-GDA services, where approximately three out of every five operators held one licence with three out of four operators holding two licences or less.

Table 1E: Percentage of All Operators by Number of Licences Held (Nationally)

Number of Licences[7]:	2015 Nationally	2016 Nationally	2017 Nationally
Operators with 1 Licence	50%	51%	50%
Operators with up to 2 Licences	70%	70%	70%
Operators with up to 3 Licences	79%	79%	77%
Operators with up to 4 Licences	86%	83%	84%
All Licences	100%	100%	100%

Table 1F: Percentage of All Non-GDA Operators by Number of Licences Held (Operators providing Non-GDA services Only)

Number of Licences[7]:	2015 Non-GDA services	2016 Non-GDA services	2017 Non-GDA services
Operators with 1 Licence	55%	59%	58%
Operators with up to 2 Licences	73%	75%	77%
Operators with up to 3 Licences	85%	84%	84%
Operators with up to 4 Licences	91%	88%	90%
All Licences	100%	100%	100%

Table 1G: Percentage of All GDA Operators by Number of Licences Held (Operators providing GDA services only)

Number of Licences[7]:	2015 GDA services	2016 GDA services	2017 GDA services
Operators with 1 Licence	42%	38%	50%
Operators with up to 2 Licences	65%	62%	78%
Operators with up to 3 Licences	71%	71%	84%
Operators with up to 4 Licences	77%	76%	91%
All Licences	100%	100%	100%

[7] "Licences" include licences and authorisations

Figure 1.1: Percentage of Operators by Number of Licences Held

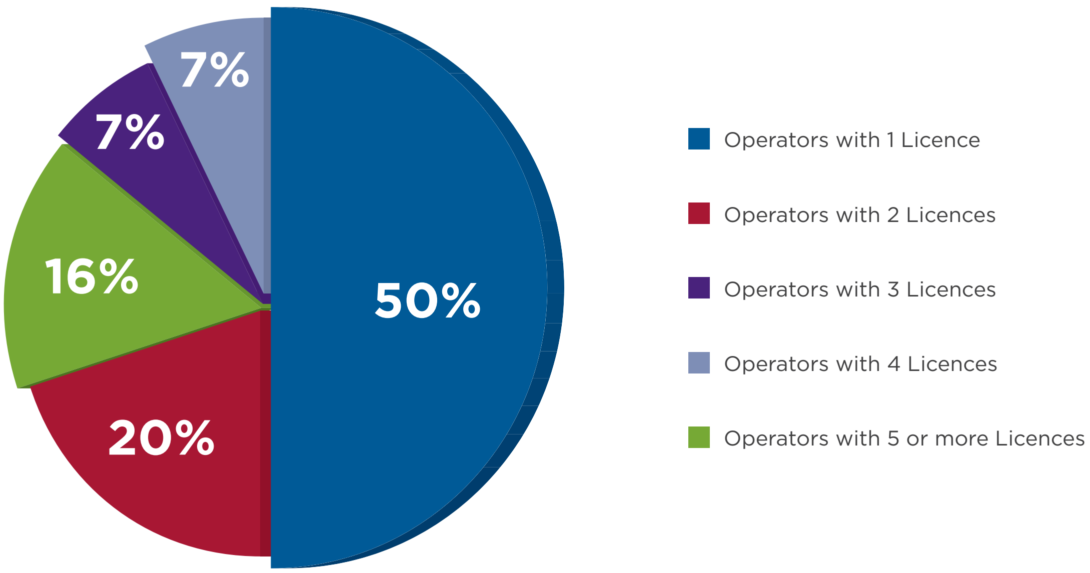
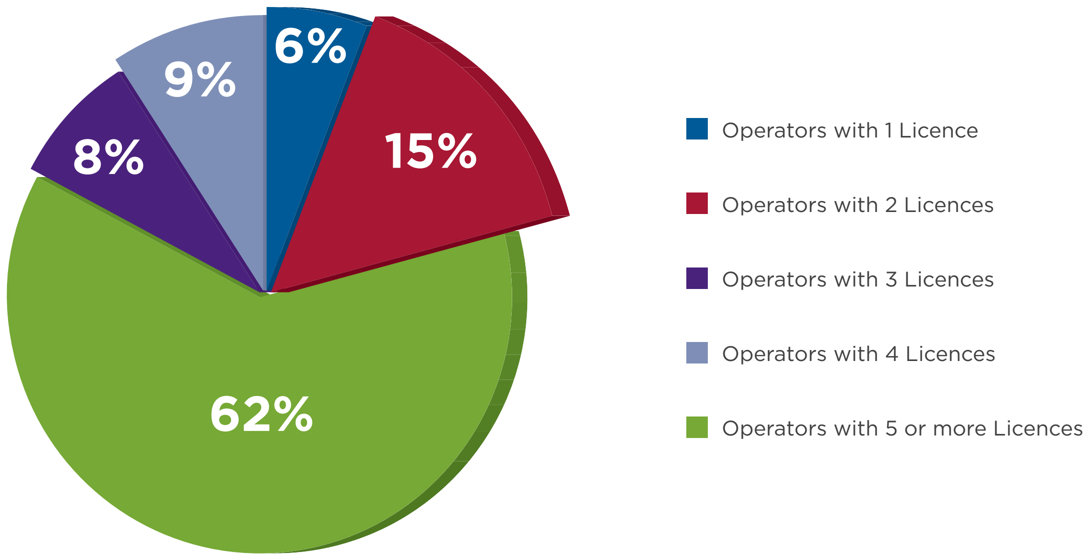


Figure 1.2: Percentage of Passenger Journeys based on Number of Licences Held



2

Total Number of Passenger Journeys

Demand for public transport services is strongly related to economic activity. Economic growth increases employment, disposable income, and consumer spend, all of which lead to greater travel. Economic decline produces the opposite effect.

Strong growth in passenger journeys continued on commercial bus services overall between 2016 and 2017. This was despite two events in 2017 which impacted on the number of passenger journeys taken in the year. These were, as mentioned above, the 21 days of industrial action by Bus Éireann and Storm Ophelia. These events had an effect on the number of commercial services provided, the number of persons travelling, and therefore the figures for the year. Growth in passenger journeys was not evenly distributed in 2017 and Non-GDA services experienced a decline of 3%. GDA services continued to experience strong growth with an increase of over 4%, which contributed to the overall passenger journey growth in the commercial bus sector on a National basis.

Total commercial passenger journeys on GDA services have seen year on year increases since 2012 and are now just under 50% higher than in 2012. GDA service commercial passenger journeys in 2017 were over 40% higher than in 2013. Non-GDA service commercial passenger journeys, which were not recorded in 2012, were just under 5% higher in 2017 than in 2013.

The total share of the commercial passenger journeys for GDA services has increased from 65% of all passenger journeys in 2013 to 71% in 2017. Tables 2A and 2B, along with Figure 2.1, highlight the growth in respect to commercial passenger journeys between 2013 and 2017. Table 2C indicates how commercial passenger journeys grew by area based on 2013 journey figures.

Table 2D gives a breakdown of the market share of commercial passenger journeys between Non-GDA services and GDA services.

For a broader view, the passenger journeys of commercial bus services and PSO[8] bus and rail services are compared in Table 2E, 2F and Figures 2.1 and 2.2. Commercial bus services have seen the greatest increase in market share of all public transport passenger journeys[9] from 8.7% in 2013 to 9.3% in 2017. While the market share of commercial passenger journeys decreased from 9.7% in 2016 to 9.3% in 2017 the two events in 2017 previously mentioned may have had a bearing on this change.

When looking at the figures it should be borne in mind that journey lengths vary significantly, depending on the type of service. For instance, a three kilometre urban journey between two stops in Dublin is not the same as a 260km interurban journey between Dublin Airport and Cork, although they are both counted as one passenger journey. It should also be noted that the figures are presented on an aggregated basis and individual operators and routes have seen increases and decreases in passenger journeys over the years.

Table 2A: Total Annual Passenger Journeys (in Millions)

Year/ Licensed & Authorised services	Non-GDA Services	GDA Services	All Commercial Bus Services	Change in Passenger Journey Numbers
2012	-	12.50	-	-
2013	7.06	13.02	20.10	-
2014	6.74	14.01	20.75	0.65
2015	7.06	15.67	22.73	1.98
2016	7.64	17.61	25.25	2.52
2017	7.41	18.37	25.78	0.53

[8] PSO services are those services provided on a non-commercial basis under contact to the Authority

[9] Figures for Taxi journeys and School Bus services are not included

Figure 2.1: Comparison of Commercial Bus Services Total Passenger Journeys by Year 2013-2017 (in Millions)

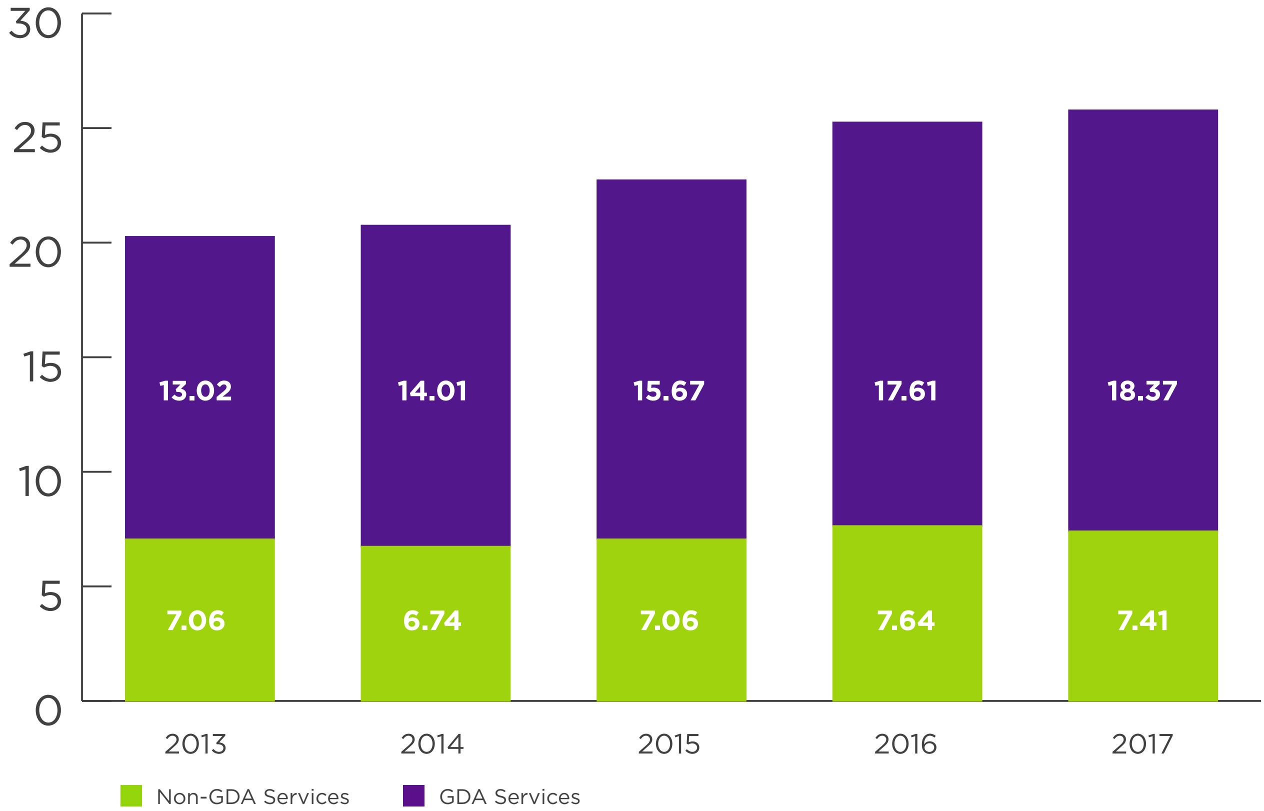


Table 2B: Percentage Change in Annual Commercial Passenger Journeys per Year

Year	Non-GDA services	GDA services	All Commercial Bus Services
2013	-	4.2%	-
2014	-4.6%	7.6%	3.3%
2015	4.8%	11.9%	9.6%
2016	8.2%	12.2%	11.0%
2017	-3.0%	4.3%	2.1%

Table 2C: Percentage Change in Annual Commercial Passenger Journeys since 2013

Change from 2013	Non-GDA services	GDA services	All Commercial Bus Services
2014	-4.6%	7.6%	3.3%
2015	0.0%	20.4%	13.2%
2016	8.2%	35.0%	25.6%
2017	4.9%	41.1%	28.2%
Overall Change from 2012	n/a	47.0%	n/a

Table 2D: Percentage Breakdown in the State of Total Annual Commercial Passenger Journeys

Year/ Licensed & Authorised services	Non-GDA services	GDA services
2013	35%	65%
2014	32%	68%
2015	31%	69%
2016	30%	70%
2017	29%	71%

Table 2E: Comparison of Commercial and PSO[10] Services Annual Passenger Journeys (in Millions)

Year	LocalLink PSO Bus Services	Commercial Bus Services	Bus Éireann PSO Services	Luas PSO Services	Iarnród Éireann PSO Services	Dublin Bus PSO Services	Total	Change in Passenger Journey Numbers
2013	1.74	20.10	28.64	30.51	36.74	112.49	230.22	-
2014	1.76	20.75	29.69	32.61	37.80	116.26	238.87	8.65
2015	1.76	22.73	30.23	34.06	39.66	119.82	248.26	9.39
2016	1.79	25.25	32.12	34.03	42.81	125.35	261.35	13.09
2017	1.89	25.78	31.13	37.65	45.51	136.26	278.22	16.87

Table 2F: Percentage of Passenger Journeys by Year by Service Type where 2013 is 100%

Year	LocalLink PSO Bus Services	Commercial Bus Services	Bus Éireann PSO Services	Luas PSO Services	Iarnród Éireann PSO Services	Dublin Bus PSO Services	Total	Change in Passenger Journey Numbers
2013	100%	100%	100%	100%	100%	100%	100%	0%
2014	101%	103%	104%	107%	103%	103%	104%	4%
2015	101%	113%	106%	112%	108%	107%	108%	8%
2016	103%	126%	112%	112%	117%	111%	114%	14%
2017	109%	128%	109%	123%	124%	121%	121%	21%

[10] PSO services are those services provided on a non-commercial basis under contact to the Authority

Figure 2.2: Comparison of Total Passenger Journeys by Transport Sector 2013-2017 (in Millions)

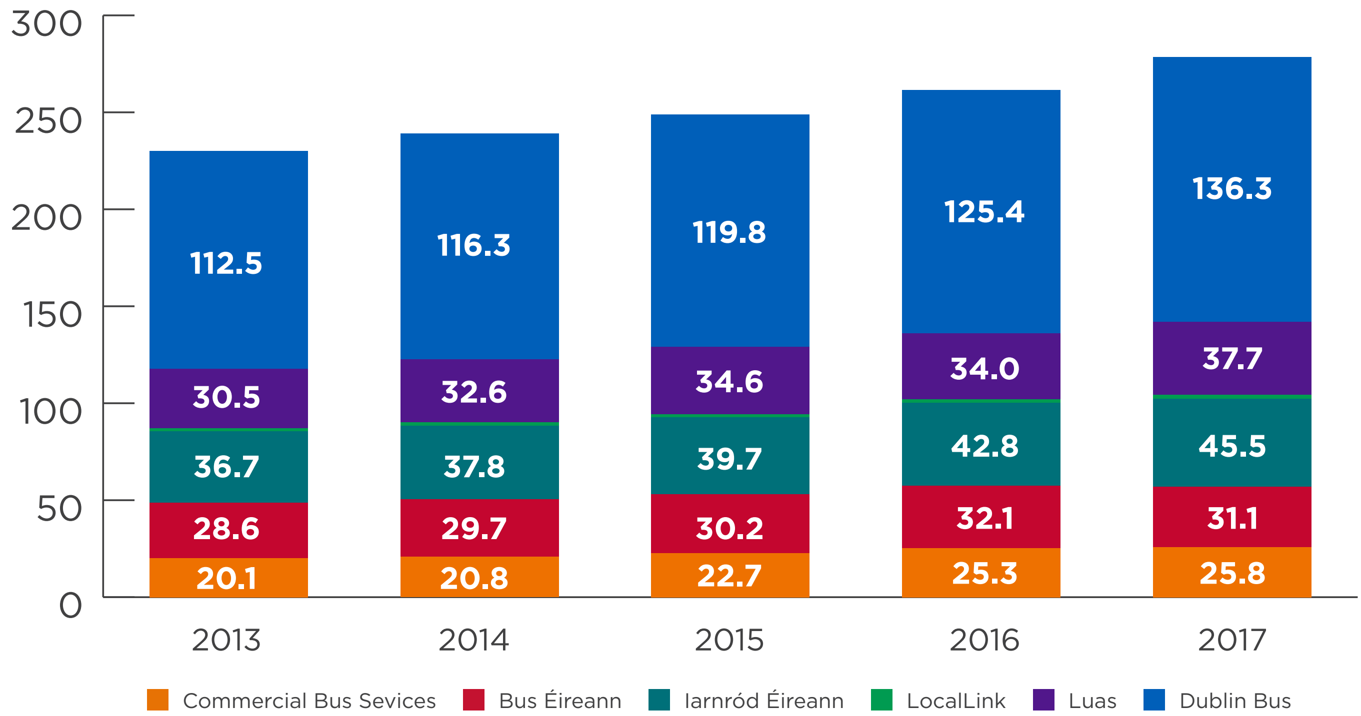
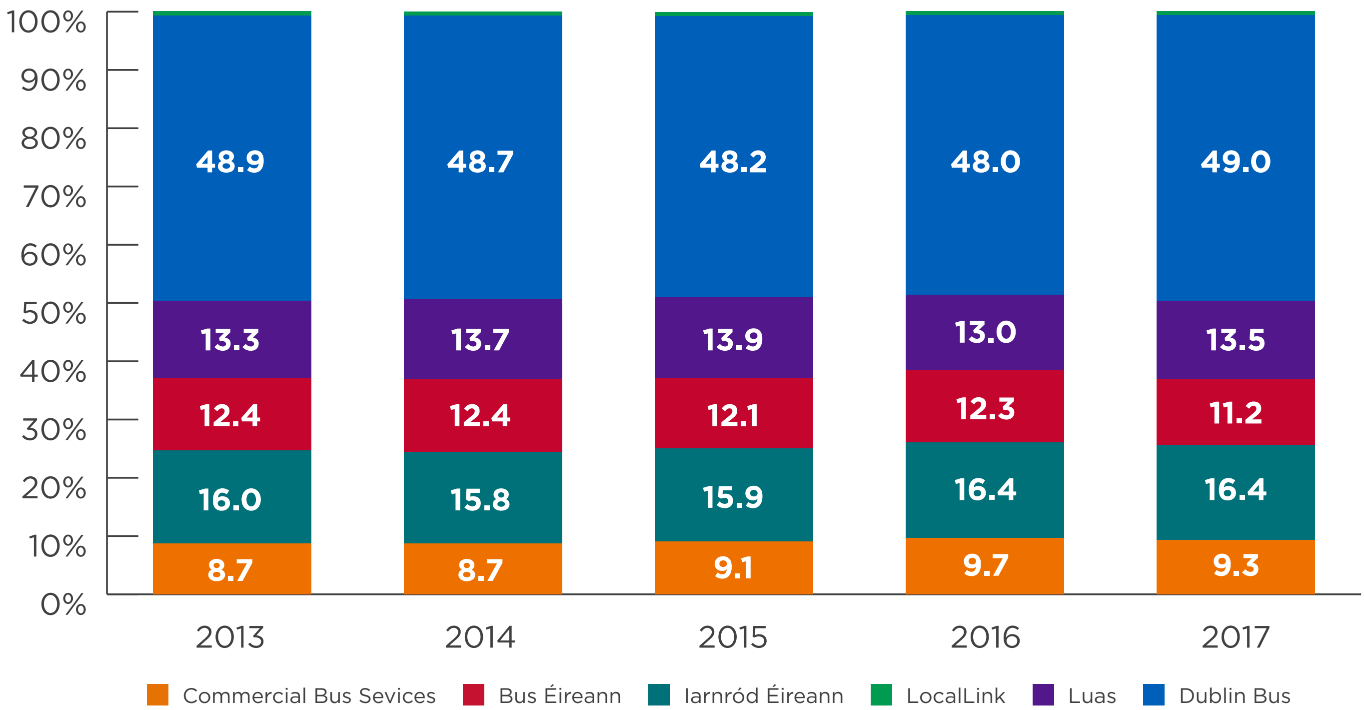


Figure 2.3: Comparison of the Percentage Share of Total Passenger Journeys by Transport Sector



3

Scheduled Vehicle Kilometres

'Scheduled vehicle kilometres' indicate the total number of vehicle kilometres intended to be operated based on the licensed timetables.

PSO services return figures on the operated vehicle kilometres for bus and rail services which refer to the actual amount of vehicle kilometres that a bus or rail company operated. Commercial and PSO vehicle kilometres have been compared below. It should be borne in mind that there may be differences between the scheduled and the operated kilometres for an operator.

The scheduled vehicle kilometres provided by commercial bus services make up a significant proportion of all public transport kilometres provided, including that provided by rail services. This is due to the broad range of journey lengths and service frequency provided by commercial bus services, as well as the ability of an operator to amend a licence. The proportion of all vehicle kilometres provided by commercial bus service has increased. In 2017 the commercial bus services accounted for just over 45% of all public transport vehicles kilometres operated. In 2013 commercial bus services represented 44%.

Overall, there was no significant change in scheduled vehicle kilometres on a national basis between the years 2016 and 2017. The two events, previously mentioned, being the 21 days of industrial action by Bus Éireann and Storm Ophelia, had an effect on the number of commercial services provided and therefore the figures for the year.

Changes in scheduled vehicle kilometres between Non-GDA services and GDA services are more pronounced. It should be remembered that GDA services, for the purposes of these statistics, include licences which provide for transport either wholly or partially within the GDA.

Non-GDA services remained static, with less than a 1% difference in the amount of scheduled vehicle kilometres provided between 2013 and 2017, despite passenger journey figures increasing 5% between those years. For GDA services the changes have been more evident, with just over 20% more scheduled vehicle kilometres provided in 2017 than in 2013. There was a 41% increase in commercial passenger journeys over the same period.

The figures indicate that more passenger journeys were taken on the existing Non-GDA services without much increase in the vehicle kilometres provided over the period. Between individual years there have been increases and decreases in both the scheduled vehicle kilometres provided and commercial passenger journeys for the Non-GDA services. In contrast, there has been significant and continued growth in use of GDA services and increases in the scheduled vehicle kilometres provided. Increases in scheduled vehicle kilometres on GDA services have, each year, been less than the increases in passenger journeys.

Figure 3.1 and Table 3A provide the annual scheduled vehicle kilometres provided by GDA and Non-GDA services from 2013 to 2017. Tables 3B and3C show the changes as a percentage. All public transport sectors are compared in Figure 3.2 and Tables 3D to 3F, which show the total vehicle kilometres for each PSO operator and commercial bus services as well as the changes per year between 2013 and 2017.

Figure 3.1: Comparison of Scheduled Vehicle Kilometres for GDA and Non GDA services by Year 2013-2017 (in Millions)

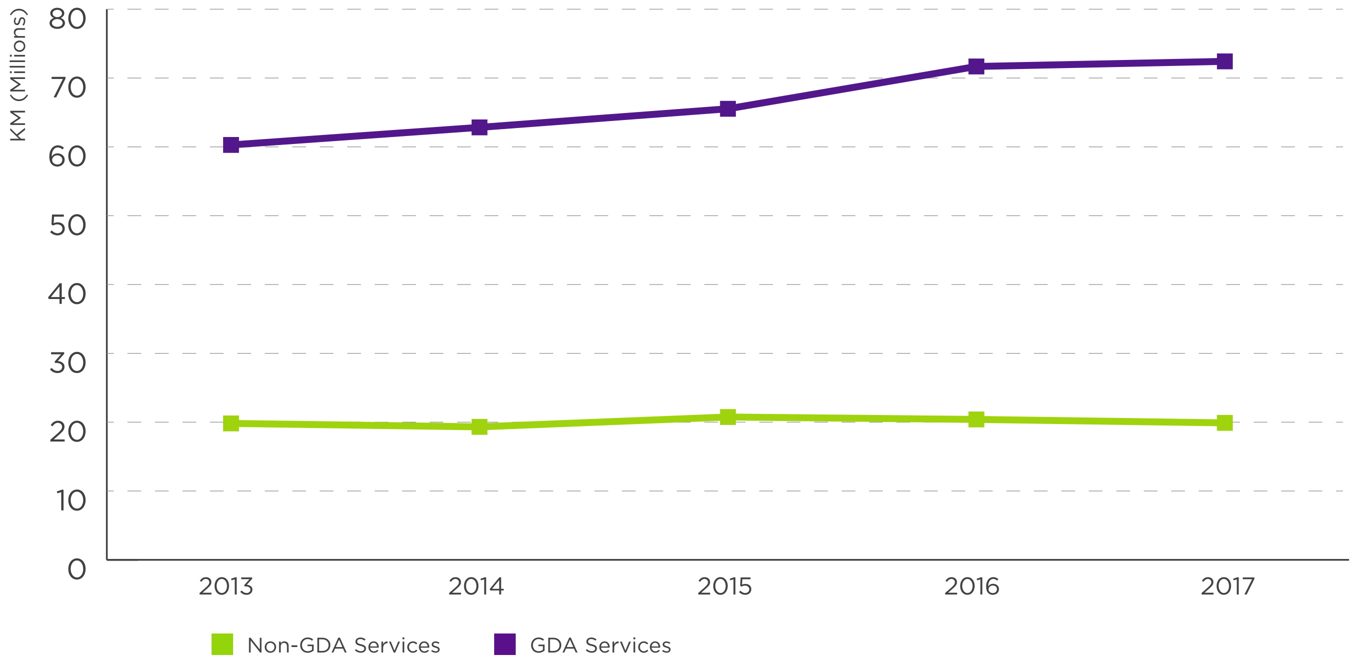


Table 3A: Annual Scheduled Vehicle Kilometres (in Millions)

Year	Non-GDA Services	GDA Services	All Commercial Bus Services
2012	-	55.10	-
2013	19.82	60.29	80.10
2014	19.32	62.83	82.15
2015	20.75	65.53	86.28
2016	20.40	71.68	92.08
2017	19.95	72.40	92.34

Table 3B: Percentage Breakdown in the State of Total Scheduled Vehicle Kilometres

Year	Non-GDA Services	GDA Services
2013	25%	75%
2014	24%	76%
2015	24%	76%
2016	22%	78%
2017	22%	78%

Table 3C: Percentage Change in Scheduled Vehicle Kilometres by Year

Year	Non-GDA Services	GDA Services	All Commercial Bus Services
2014	-2%	4%	3%
2015	7%	4%	5%
2016	-2%	9%	7%
2017	-2%	1%	0%
2013-2017	0.65%	20.1%	15.3%

Figure 3.2: Comparison of Total Vehicle Kilometres by Transport Sector 2013-2017 (in Millions)

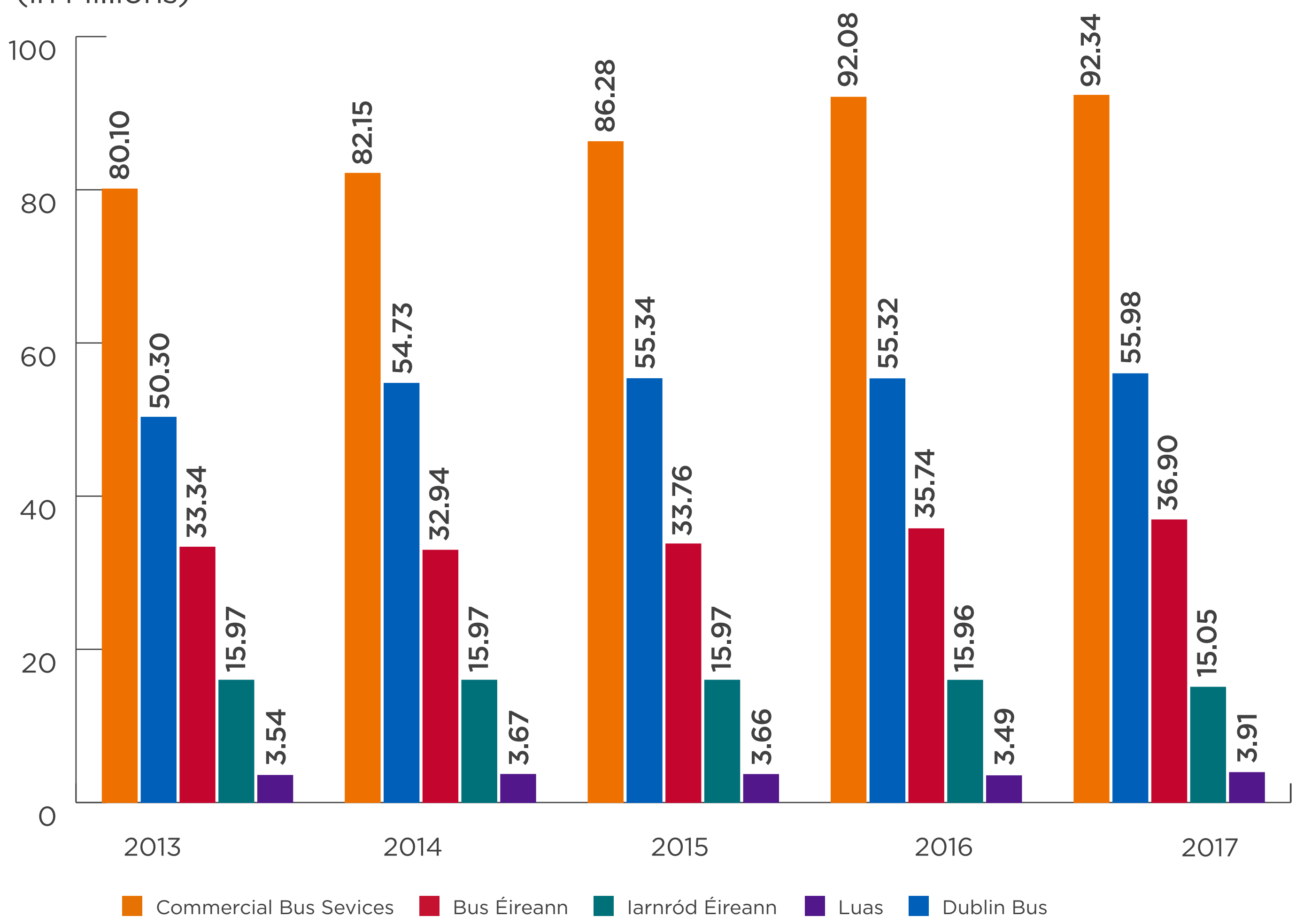


Table 3D: Vehicle Kilometres for PSO and Commercial Bus Services by Service Type (in Millions)

Year	Luas PSO Services	Iarnród Éireann PSO Services	Bus Éireann PSO Services	Dublin Bus PSO Services	Commercial Bus Services	Total
2013	3.54	15.97	33.34	50.30	80.10	183.25
2014	3.67	15.97	32.94	54.73	82.15	189.46
2015	3.66	15.97	33.76	55.34	86.28	195.01
2016	3.49	15.96	35.74	55.32	92.08	202.59
2017	3.91	15.05	36.90	55.98	92.34	204.18

Table 3E: Percentage of all Vehicle Kilometres by Service Type

Year	Luas PSO Services	Iarnród Éire-ann PSO Services	Bus Éireann PSO Services	Dublin Bus PSO Services	All Commercial Bus Services
2013	1.9%	8.7%	18.2%	27.4%	43.7%
2014	1.9%	8.4%	17.4%	28.9%	43.4%
2015	1.9%	8.2%	17.3%	28.4%	44.2%
2016	1.7%	7.9%	17.6%	27.3%	45.5%
2017	1.9%	7.4%	18.1%	27.4%	45.2%

Table 3F: Percentage Change per year in Vehicle Kilometres by Service Type

Year	Luas PSO Services	Iarnród Éireann PSO Services	Bus Éireann PSO Services	Dublin Bus PSO Services	Commercial Bus Services	Total Change
2014	3.5%	0.0%	-1.2%	-2.8%	2.6%	3.4%
2015	-0.1%	0.0%	2.5%	1.1%	5.0%	2.9%
2016	-4.7%	-0.1%	5.9%	0.0%	6.7%	3.9%
2017	12.1%	-5.7%	3.2%	1.2%	0.3%	0.8%
2013 - 2017	10%	-6%	11%	11%	15%	11%

4

Commercial Bus Services Revenue and Ticketing

Commercial bus service revenue consists of all revenue from ticket sales including cash, TaxSaver, Leap card, online, and prepaid tickets as well as payments to operators participating in the Department of Employment Affairs and Social Protection's Free Travel Scheme.

Ticket revenue accounted for over 88% of all revenue, with Free Travel Scheme payments accounting for just under 12%. This has reduced from 2013, when Free Travel Scheme payments represented 15% of revenue. In line with this the estimated number of free travel passenger journeys taken on commercial bus services has also reduced from an estimated 24% in 2013 to an estimated 20% of all passenger journeys in 2017.

TaxSaver

The TaxSaver Commuter Ticket Scheme allows employees to avail of public transport commuter tickets if they are travelling to work by public transport. The scheme involves employers providing employees with public transport commuter tickets, while saving on employer PRSI payments. Employees participating in the scheme benefit from reduced tax and PRSI payments. The scheme is generally known as the TaxSaver scheme but other names can be used by individual public transport operators.

The percentage of operators offering TaxSaver increased again in 2017 and was offered by 25% of all operators. See Table 4C.

Leap Card

The Leap card was introduced in late 2011 and is an integrated smart card which is available for both publicly subsidised and commercially licensed services.

There were 13 commercial operators in 2017 which accepted Leap card on their regular commercial bus services. These were St. Kevin's Bus; Ashbourne Connect; Dualway Coaches; City Direct Galway; Citylink; Collins Coaches; Express Bus; Matthews Coaches; Swords Express; Wexford Bus; Mortons Coaches; Dublin Bus and Bus Éireann.

Free Travel Revenue

A number of commercial bus services have been accepted as part of the Department of Employment Affairs and Social Protection's Free Travel Scheme. Operators that are part of the scheme receive payments for the fare forgone for carrying passengers entitled to free travel.

Overall Free Travel Scheme payments to commercial operators are set out below. These include payments for free travel within the State for both Irish and Northern Irish passengers, as well as payments for cross border free travel.

Table 4A shows the total ticket revenue and Free Travel Scheme payments for the regular commercial bus services sector between 2013 and 2017. This includes figures for the commercial Bus Éireann services such as the Expressway services and the commercial Dublin Bus Airlink services. The Free Travel Scheme payments are inclusive of payments for cross border travel and international foreign free travel payments.

Table 4B shows the percentage change in revenue per year with changes in passenger journeys and vehicle kilometres included for comparative purposes. Table 4C shows the number of operators offering TaxSaver.

Table 4A: Annual Passenger Revenue (in Millions)

Year	Total Annual Ticket Revenue	Total Annual FT Payments	Total Revenue	Change in Total Revenue per Year	FT Payments as a Percent of All Revenue
2013	€115.89	€20.05	€135.94	-	14.8%
2014	€129.55	€20.10	€149.65	10%	13.4%
2015	€143.19	€20.42	€163.61	9%	12.5%
2016	€155.62	€20.49	€176.11	8%	11.6%
2017	€157.69	€20.10	€177.78	1%	11.3%

Table 4B: Percentage Change from Previous Year for Total Passenger Journeys, Vehicle Kilometres and Ticket Revenue

Year	Passenger Journeys	Vehicle Kilometres	Ticket Revenue
2014	3.3%	2.6%	11.8%
2015	9.6%	5.0%	10.5%
2016	11.0%	6.7%	8.7%
2017	2.1%	0.3%	1.3%

Table 4C: Number of Operators Offering one or more TaxSaver Tickets

Year	Operators Offering 1 or More TaxSaver Tickets	Percentage of All Active Operators Offering TaxSaver Tickets
2013	17	14%
2014	27	21%
2015	25	20%
2016	28	23%
2017	31	25%

5

Free Travel Passenger Journeys

The Department of Employment Affairs and Social Protection's Free Travel Scheme is available to all persons aged 66 and over living permanently in the State. Some people under 66 may also qualify, such as carers in receipt of a Carer's Allowance and certain other persons in receipt of a Disability Allowance and Invalidity Pension.

Free travel is available on State funded bus and rail transport including Dublin Bus, Bus Éireann, Iarnród Éireann and Luas services. Free travel is also available on a number of commercial bus services. Since 1995, Northern Ireland Senior Citizens aged 65+ have been eligible for restricted cross border free travel from any point in Northern Ireland to any destination within the Republic of Ireland.

This provision was further expanded in 2007, to allow eligible Northern Ireland 65+ Senior Smart Pass holders, to travel for free not only to a destination across the border but also on internal public transport services within the Republic of Ireland.

As part of the Annual Bus Operator Annual Returns, operators estimate the number of free travel passenger journeys as a percentage of all journeys for each licence and authorisation. While the estimated total number of free travel passenger journeys has risen between 2013 and 2017 by 9% on a national basis (see Table 5A), due to the overall growth levels of 28% in commercial passenger journeys in the same period the free travel passenger journeys has decreased from 24% of all commercial passenger journeys in 2013 to 20% in 2017.

A significant divide between free travel passenger journeys on Non-GDA and GDA services has emerged and increased over the period from 2013 to 2017.

While overall Non-GDA passenger journeys have increased 5% between 2013 and 2017, the estimated number of free travel passenger journeys has risen by an estimated 22% going from 36% of all passenger journeys in 2013 to 42% of all passenger journey in 2017.

The same is not true of GDA services, which have an estimated 6% decrease in free travel passenger journeys over the same period while having a 41% increase in overall commercial passenger journeys. The overall percentage of free travel passenger journeys on GDA services reduced from 17% in 2013 to 11% in 2017. These reported changes mean that Non-GDA services increased the percentage share of all free travel passenger journeys from 54% in 2013 to 60% in 2017.

Table 5A and 5B below set out the estimated figures. Table 5C shows the percentage share of estimated free travel passenger journeys between GDA and Non-GDA services.

Table 5A: Estimated Number of Free Travel Passenger Journeys (in Millions)

Year	All Commercial Bus Services	Non-GDA services	GDA services
2013	4.79	2.57	2.22
2014	4.73	2.84	1.89
2015	4.92	2.94	1.98
2016	5.29	3.26	2.03
2017	5.21	3.13	2.08

Table 5B: Estimated Free Travel Passenger Journeys as a Percentage of All Passenger Journeys

Year	All Commercial Bus Services	Non-GDA services	GDA services
2013	24%	36%	17%
2014	23%	42%	13%
2015	22%	42%	13%
2016	21%	43%	12%
2017	20%	42%	11%
Total Change 2013-2017	8.8%	21.7%	-6.2%

Table 5C: Percentage share of Estimated Free Travel Passenger Journeys

Year	Non-GDA services	GDA services
2013	54%	46%
2014	60%	40%
2015	60%	40%
2016	62%	38%
2017	60%	40%

It should be noted that these figures have been calculated by multiplying the estimated percentage of free travel passenger journeys provided by operators by the total passenger journeys on the respective routes. The figures should therefore be taken as indicative of trends only, rather than precise calculations.

6

Commercial Operator Fleet Size

The number of vehicles that were used in 2017 to provide commercial bus services in the State was 1,389. The Authority also asked commercial operators whether their vehicles were also used for other activities, to show not only how many vehicles operators used to provide their commercial bus services but also how much these vehicles were used solely for running these services.

As an example, if an operator had one vehicle and this vehicle was used 70% of the time for commercial bus services and 30% of the time for school transport services, then the operator would count that as 0.7 of a vehicle when reporting their exact number of buses used.

Using this method of calculation there were 1,177 vehicle used on a full time basis to provide commercial bus services. This is an increase of 208 vehicles since 2013. See Table 6A below.

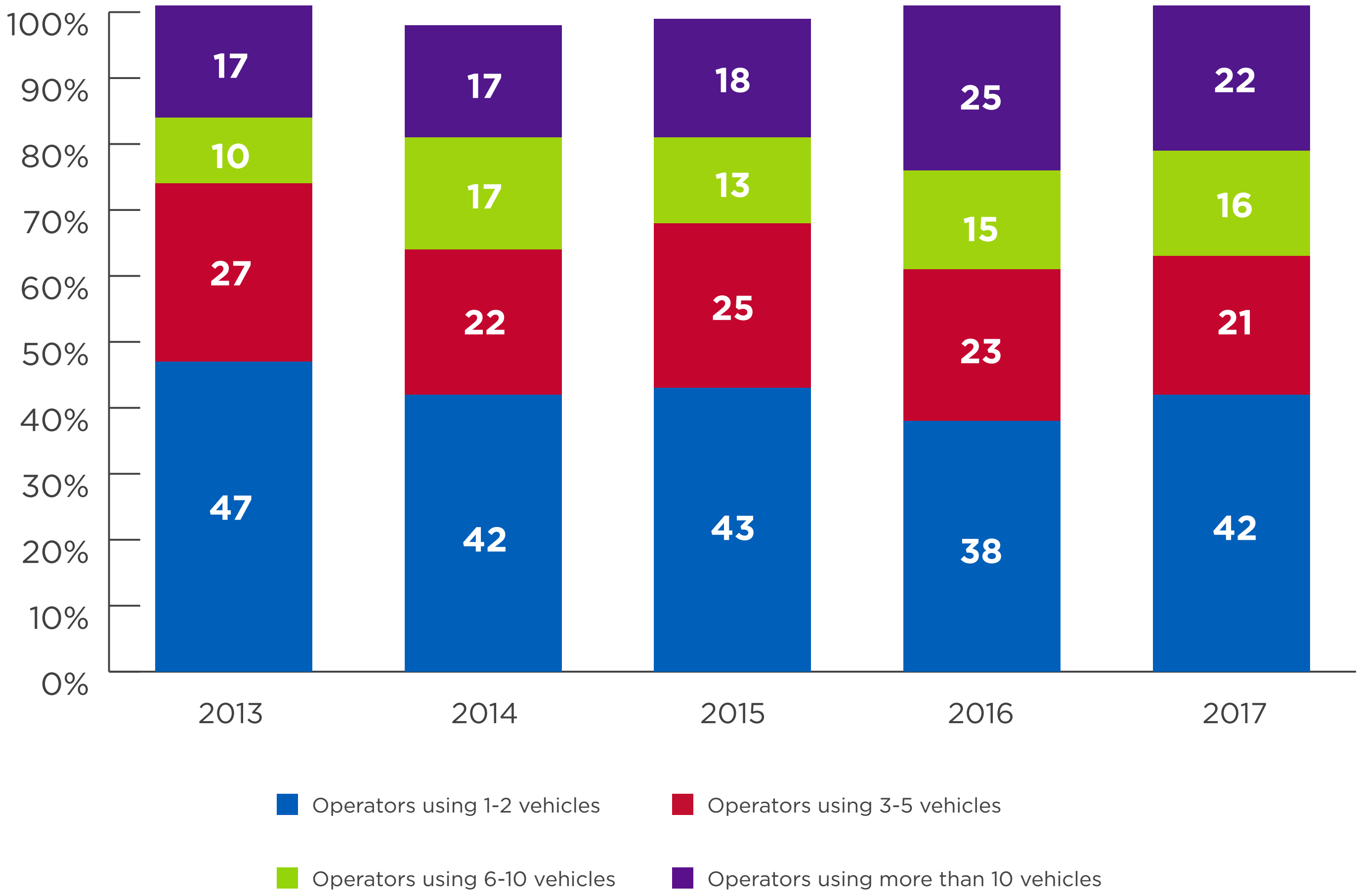
Operators were also asked to provide the total number of vehicles counted. This provides information on the number of vehicles available and used to provide commercial bus services. Figure 6.1 charts the percentage of operators as against the total number of vehicle counted. The percentage is based on the total number of vehicles counted by operators.

Vehicles referred to in the tables include a broad variety of vehicles, such as inter-city coaches, low-floor urban double and single decker buses, as well as midi and mini buses. These vehicles have a range of passenger seat capacities and different designs.

Table 6A: Total Number of Vehicles used to provide Regular Commercial Bus Services

Number of Vehicles/Year	2013	2014	2015	2016	2017
Number of vehicles used on full time basis	969	1,037	994	1,125	1,177
Number of vehicles counted	1,062	1,227	1,223	1,371	1,389

Figure 6.1: Comparison of the Percentage of Operators by Number of Vehicles Used



7

Accessibility of Operating Fleet and Scheduled Vehicle Kilometres Provided

There are two key indicators of the accessibility of a fleet. These are the percentage of vehicles in a fleet which are accessible, as well as the proportion of all the scheduled vehicle kilometres these vehicles are used to provide.

Wheelchair Accessibility
The wheelchair accessibility of the commercial bus services fleet is examined below. It is important to highlight that a vehicle can be either low-floor wheelchair accessible or wheelchair accessible through the use of a lift. There are a small number of vehicles within the fleet that are accessible to wheelchairs by being both low-floor and having the use of a lift, although this is less common. Such vehicles have been counted as one accessible vehicle.

The number of accessible vehicles has gradually increased since 2013. However, the total scheduled vehicle kilometres which the vehicles provided increased at a greater rate. There are differences in the accessibility standard of a vehicle for users depending on whether the vehicle is a low floor vehicle or has a wheelchair lift. The greatest number of accessible vehicles being used to provide commercial bus services is reported as being vehicles with wheelchair lifts. The reported number of low floor vehicles has increased, but represented just over one in three of the accessible vehicles in 2017. This was approximately three out of every twenty vehicles used to provide commercial bus services in 2017. The differences between the accessibility of the vehicles are set out in Tables 7A and 7B.

Low-floor vehicles suitable for wheelchair access
Low-floor vehicles accounted for 18% of vehicles reported as being used in 2017. Low-floor wheelchair accessible vehicles are vehicles where access from the bus stop to part or all of the passenger area is direct from the bus stop apron. There are no steps involved and a wheelchair lift is not used.

Optionally, the vehicle may lower to kerb level and there may be an entry and exit access ramp for quick and safe wheelchair access. This enables easier access for wheelchair users and those with limited mobility. Accessing low floor vehicles can also require that appropriate bus stop infrastructure, for instance kerbs of a specific height, are in place.

Vehicles with lifts suitable for wheelchair access
Vehicles with wheelchair lifts accounted for 30% of vehicles reported as being used in 2017. Vehicles with wheelchair lifts raise the individual and wheelchair above the steps of the vehicle and into the coach corridor area. This feature requires a deep space at the footpath which is not always available. The use of wheelchair lifts increases the dwell time at bus stops and may not be as preferable for the passenger as the low-floor, roll-on, roll-off option.

Vehicles with wheelchair lifts are often only able to carry one passenger using a wheelchair at any given time because only one designated wheelchair space may be available. It can also be the case that the customer using a wheelchair may need to inform the operator in advance that they wish to use the service as vehicle seating may need to be removed to provide for a designated wheelchair space.

Scheduled vehicle kilometres operated by wheelchair accessible vehicles
Estimates of the scheduled kilometres operated by wheelchair accessible vehicles have been set out in Table 7C. Nationally, this was 61% of the scheduled vehicle kilometres in 2017. Figures indicate more and more of all scheduled kilometres are being provided by accessible vehicles. The figures indicate that three out of every five scheduled kilometres provided by commercial bus services were wheelchair accessible in 2017, up from two out of every five in 2013.

It is important to bear in mind that the figures are provided on an overall vehicle fleet basis and are therefore high level only. Some routes and services were generally provided on a full time level by accessible vehicles, while others were inaccessible for wheelchair users. The figures set out below are derived from these estimations by operators. They are intended to be read to illustrate trends and not as exact calculations.

For instance, if an operator had three vehicles and one was wheelchair accessible then it would be expected that 33% of the total scheduled kilometres would be operated with accessible vehicles. However, if the wheelchair accessible vehicle was regularly used for commercial bus services, whereas the other vehicles were used less often or used as spares, then it would be expected that the percentage would be higher, because most of the services would be provided with the wheelchair accessible vehicles.

The percentages are arrived at by multiplying the overall scheduled kilometres by the percentage of accessible vehicles used. The percentage of accessible vehicles used is calculated based on the total number of vehicles counted by an operator, rather than as a percentage of the number of vehicles used on a full time basis, as data has been provided on the basis of the total number of accessible vehicles available.

Table 7A: Number of Accessible Vehicles

Year	Vehicles that are Low-Floor Wheelchair Accessible	Vehicles with lifts suitable for Wheelchair access	All Accessible Vehicles	Total Number of Vehicles used
2013	137	308	445	1062
2014	148	279	428	1227
2015	176	321	497	1223
2016	217	382	599	1371
2017	244	420	664	1389

Table 7B: Percentage of Accessible Vehicles

Year	Vehicles that are Low-Floor Wheelchair Accessible	Vehicles with lifts suitable for Wheelchair access	All Accessible Vehicles	Total Number of Vehicles used
2013	13%	29%	42%	1062
2014	12%	23%	35%	1227
2015	14%	26%	41%	1223
2016	16%	28%	44%	1371
2017	18%	30%	48%	1389

Table 7C: Estimation of Scheduled Kilometres provided by Accessible vehicles based on Data provided by Operators.

Year	Total Scheduled Vehicle KM Nationally	Accessible KM based on Operating Fleet	Vehicle KM Operated by Accessible Vehicles
2013	80.1	31.4	39%
2014	82.2	35.9	44%
2015	86.3	47.4	55%
2016	92.1	55.8	61%
2017	92.3	55.9	61%

8

Commercial Operating Fleet with Automated Vehicle Location Systems

Automatic Vehicle Location ("AVL") is the term used for automatically determining the geographic location of a vehicle or number of vehicles. Vehicles are generally tracked by placing a Global Positioning System electronic device in or on a vehicle. There are a number of benefits to AVL, including that it allows an operator to manage their fleet better, know where the vehicles are at any given point and it facilitates the provision of real time passenger information ("RTPI").

The number of vehicles providing commercial bus services equipped with AVL systems has increased from 60% of all vehicles used in 2013 to 75% in 2017. See Table 8A.

It should be noted that although many AVL systems may be of benefit to an individual operator, only specific AVL systems are compatible to the State's RTPI facility that is available through on-street displays and through the Authority's website, apps or SMS service. Therefore, having vehicles with AVL on board would not be a sufficient guide as to whether these services could participate in the RTPI facility.

Table 8A: Number of Vehicles with AVL

Year	Number of Vehicles with AVL	Percentage of Vehicles with AVL	Total Number of Vehicles Used
2013	639	60%	1062
2014	812	66%	1227
2015	807	66%	1223
2016	960	70%	1371
2017	1038	75%	1389

9

Commercial Fleet Age

The average age of vehicles providing commercial bus services has remained low. From 2013 to 2017 the average vehicle age has changed by approximately one year from 6.8 years to 7.8 years. See Table 6A. Over this period the number of vehicles being used increased by 327 vehicles. This demonstrates significant investment in the commercial fleet by operators which has increased in size by just under a third in five years while maintaining a low average vehicle age.

The average age of a fleet is an important measure as the age of a vehicle can influence accessibility standards, vehicle emission levels, fuel efficiency, vehicle safety features, maintenance requirements, and reliability. Vehicle age can have material impact on maintaining current service user levels, as well as attracting new users to a service as passengers can have a preference for travelling on newer vehicles with enhanced features and designs.

Table 9A: Average Age of Vehicles used to provide regular services

Year	Average Vehicle Age in Years	Total Number of Vehicles used
2013	6.8	1062
2014	6.6	1227
2015	6.8	1223
2016	7.0	1371
2017	7.8	1389

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